

2024 Annual Member Recertification

Michelle Souder Membership Process & Services

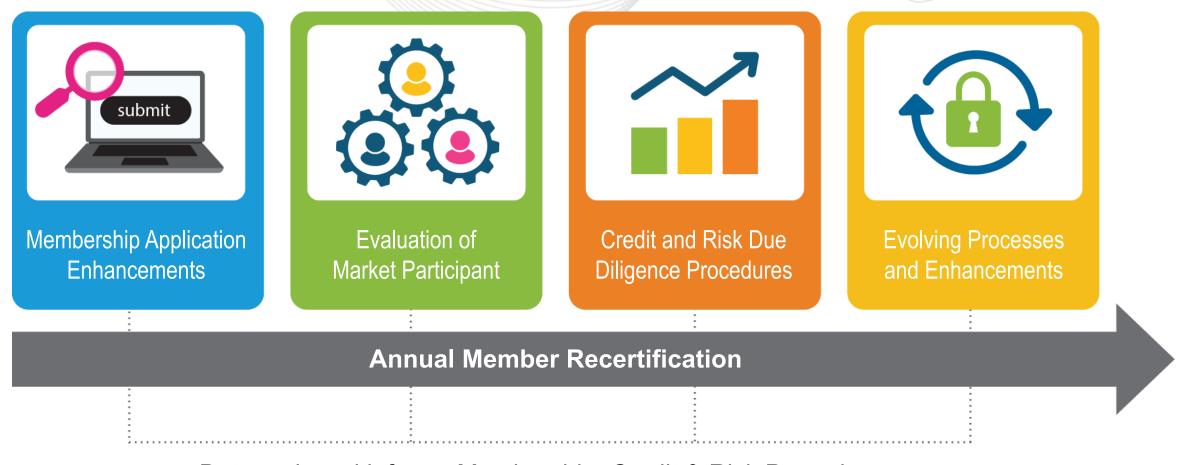
Kate Patt Credit Risk & Collateral Management



Annual Member Recertification Impacts

Action Required	Deadline	Who May Be Affected	
Complete Annual Member Recertification Items	04/12/2024	04/12/2024 All Full Members	
Complete Annual Officer Certification Form	04/30/2024	All Market Participants	
	10		

Know Your Customer (KYC) Procedures



Data gathered informs Membership, Credit & Risk Procedures



Annual Member Recertification

- Full Members required to validate the following information annually
 - Sector Selection
 - *Affiliate Disclosure Information
 - Related Party Information (Electric Distributor sector only)
 - Contact Managers
 - Company Account Manager (CAMs)
 - *Company Corporate Information (Address, Stock Information)
- Must be completed by a designated Officer, Authorized Representative, or Maintenance Manager
- Process defined in Manual 33, Section 3



Market Participant Requirements

- Market Participants required to provide the following information
 - Annual Officer Certification Form
 - Must be signed by an Officer
 - Required each calendar year between January 1 and April 30
 - Principals
 - Utilized for Know Your Customer (KYC) processes (on-going)
- Per compliance with PJM Tariff, <u>Attachment Q</u>

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2024 Membership Management Community Enhancements

Area	Recertification Enhancements (January 2024 implementation)				
Annual Officer Certification Form	 May be initiated and completed by Officer, Authorized Representative or Maintenance Manager, or completed by authorized individual designated in the Officer Certification Role Completed in Membership Management Community and Officer reviews and signs in DocuSign 				
Company Corporate Information	 Community page added to display corporate address and stock information. Ability for Members to update information as necessary 				



2024 Membership Management Community Enhancements

Area	Recertification Enhancements (January 2024 implementation)			
Affiliate Disclosure	 Enhancements to consolidate screens and improve user experience Enhancement to capturing/displaying affiliate stock information Added ORG Chart upload function 			

A oim	2024 Recertification Tasks and Timeline					
Required Tasks	Tool	Open Date	Due Date	Must be completed by		
 Sector Selection Affiliate Disclosure Related Parties Contact Managers CAMs Company Information Principals* 	Membership Management Community	January 8 th , 2024	April 12th	OfficerAuthorized RepresentativeMaintenance Manager		
Officer Certification Form* * Market Participants only	Membership Management Community	January 8 th , 2024	April 30 th	 Initiated and completed by Officer, Authorized Representative, or Maintenance Manager, or completed by designated Officer Cert Role, but Officer must review and sign 		



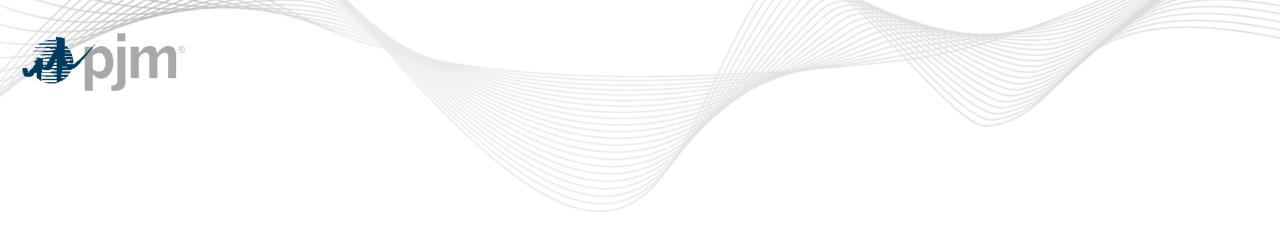


Annual Member Recertification Process:

membershipforms@pjm.com

credit hotline@pjm.com

Member Hotline (610) 666 – 8980 (866) 400 – 8980 custsvc@pjm.com



Appendix



Additional Resources

- Annual Member Recertification User Guide
- Annual Officer Certification Form Instructions
- <u>Membership Management Community tool page</u>
- Form of Secretary Certificate: Add Officers, Authorized Representatives and Maintenance Managers (must be notarized)
- <u>Officer, Authorized Rep, Maintenance Manager Designation Form:</u> Add and revoke Officers, Authorized Representatives, and Maintenance Managers
- Form of Secretary Certificate FAQ